



Personnel Administration

Chapter 7

Process Termination, Retirement, and DROP Actions



Process Termination, Retirement, and DROP Actions Objectives

By the end of this chapter, you will be able to:

- Define terms, concepts and procedures
- Process Termination
- Process Retirement
- Perform DROP Action



Termination and Retirement

Employees terminated or retired in AASIS will have their personnel number and master data information retained in the system.

Note: Employees terminated or retired in AASIS will have their personnel number and master data information retained in the system.



DROP

**AGENCY RECEIVES
DROP DOCUMENT**



AASIS
ROLE



Agency Personnel Management

**AGENCY SELECTS
DROP ACTION**



PA40

**AUTOMATIC EMAIL
VIA SAP-INBOX, SENT TO
OTHER HUMAN RESOURCE
ADMINISTRATORS**





Exercise Scenario #14

- One of your agency's employees has enrolled in the DROP program.
Process the DROP Action.



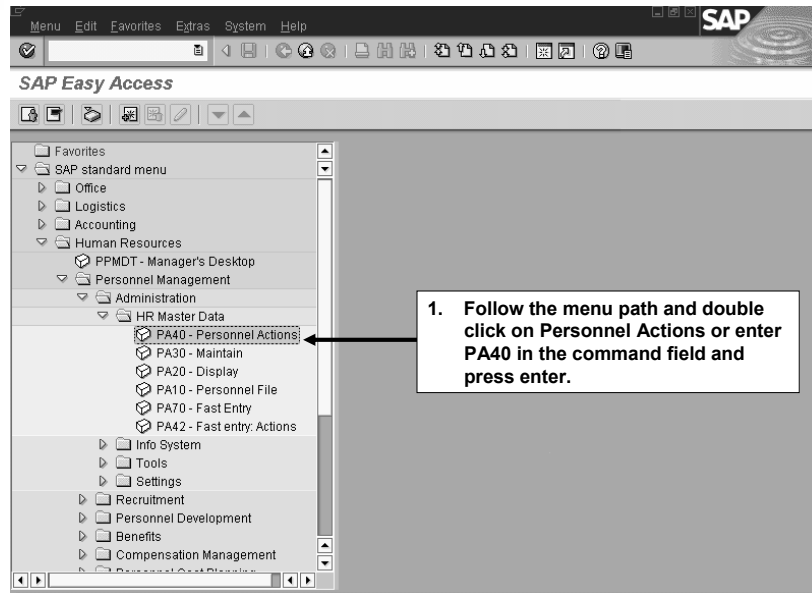


Demonstration

DROP

Human Resources > Personnel Management >
Administration > HR Master Data > Personnel Actions
(PA40)





1. Follow the menu path and double click on Personnel Actions or enter PA40 in the command field and press enter.

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Personnel no. 2433
 Name Turner, Quantez
 EE group 7 State Extra/Sea.
 EE subgroup U0 Hourly
 From 10/05/2005

Personnel Actions

Action Type	Personnel	EE group	EE subg.
Hire			
Hire Board or Commission Membr			
Rehire			
Re-employment of Retiree			
Change in Pay/Posn Attributes			
Transfer			
Promotion/Demotion			
DROP			
LWOP			
Return			
Termination			
Retirement			
Concurrent Employment			
Terminate Concurrent Empl.			

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Note: In the 'Start' field, enter the employee's date of enrollment in DROP.

The effective date must not be earlier than the beginning of the first pay period of the fiscal year. For example, an action initiated on 7/6/04 may have an effective date no earlier than 6/20/04.

If it is necessary for the agency to have an effective date beyond the beginning of the first pay period of the fiscal year limit, the agency must send a request with justification to State Payroll Manager at the Office of Personnel Management/State Payroll (fax number 501-682-5094) for approval.



Infotype Edit Goto Extras System Help

Copy Actions

7. Click enter twice.

8. Click Save.

Pers.no. 227

Name Rudolph Johnson

EE group 1 Regular State Em... Personnel ar FA01 DFA

EE subgroup UE Employee SSN 987-65-1234

Start 03/16/2001 to 12/31/9999

Personnel action

Action type DROP

Reason for action

6. Select 'DROP' from the drop-down list.

Status

Customer-defined No Concurrent Employment

Employment Active

Special payment No special payment


Organizational assignment

Position 22094658 ADMINISTRATIVE ASSISTANT

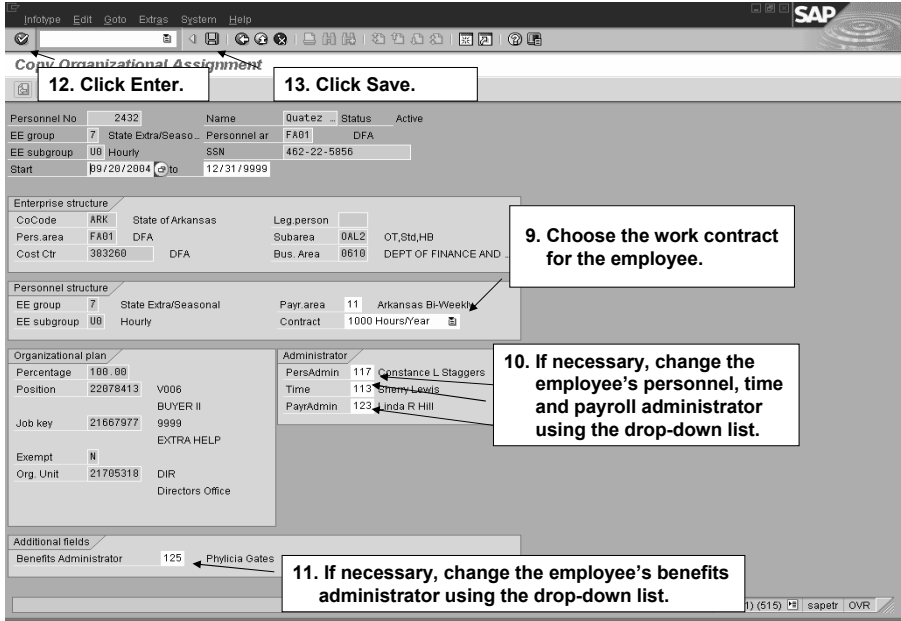
Personnel area FA01 DFA

Employee group 1 Regular State Empl.

Employee subgroup UE Employee

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The screenshot shows the SAP Organizational Assignment (PA30) transaction. The interface includes a menu bar (Infotype, Edit, Goto, Extras, System, Help) and a toolbar. The main area is divided into several sections: Personnel data, Enterprise structure, Personnel structure, Organizational plan, and Additional fields. Callouts with arrows point to specific fields:

- 12. Click Enter.** Points to the 'Start' date field (09/29/2004).
- 13. Click Save.** Points to the top right of the screen.
- 9. Choose the work contract for the employee.** Points to the 'Contract' field (1000 Hours/Year).
- 10. If necessary, change the employee's personnel, time and payroll administrator using the drop-down list.** Points to the 'PersAdmin', 'Time', and 'PayrAdmin' fields.
- 11. If necessary, change the employee's benefits administrator using the drop-down list.** Points to the 'Benefits Administrator' field (125).

At the bottom of the screenshot, the text reads: AASIS Support Center, V3.0 November, 2005 Gwinnett Orr

NOTE: When the agency personnel with the role of Personnel Management, Personnel Specialist or Employee Benefits Specialists uses transaction code PA30 Maintain HR Master Data to update the Contract field on IT0001 Organizational Assignment, the 2nd Program Grouping field on IT0171 General Benefits Information infotype will automatically be updated. The start date entered on the IT0001 record will also be reflected on the IT0171 record.



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Infotype Edit Goto Extras System Help
SAP

Create Monitoring of Dates

Personnel no. 227

EE group 4 State Drop Emplo_

EE subgroup UE Employee

Name Rudolph Status Active

Personnel ar FA01 DFA

SSN 987-65-1234

Date

Task type DROP Start Date

Date ☒ Processing indicator New task

Reminder

Reminder date


Lead/follow-up time

Comments

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Note: The DROP start date should be the same date used in step #3.

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18. Click Enter.

19. Click Save.

20. Click Cancel to go to the next screen.

17. Enter the new 'DROP End Date' for the employee.

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Note: The Drop End Date is seven years from the Drop Start Date.

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Copy Date Specifications

22. Click Enter.

23. Click Save.

21. You can select from the drop-down list the employee's DROP Start Date and DROP End Date in the 'Date type' field. Enter the actual day in the 'Date' field.

Date type	Date	Date type	Date
Z1 Original Hire Date	03/01/2001	Z2 Career Service Date	03/01/2001
Z3 Latest Hire Date	03/01/2001	Z4 Leave Accrual Date	03/01/2001
Z9 Perf. Eval. Date	03/01/2002		

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Note: If your agency's person with the role of Agency Benefits Specialists is not identified as the Benefits Administrator on the Organizational Assignment infotype 0001, you will need to IMMEDIATELY notify that person of the DROP action and the effective date used.



Exercise Scenario #15

- One of your agency's employees has turned in a resignation letter. Process the Termination Action.





Demonstration

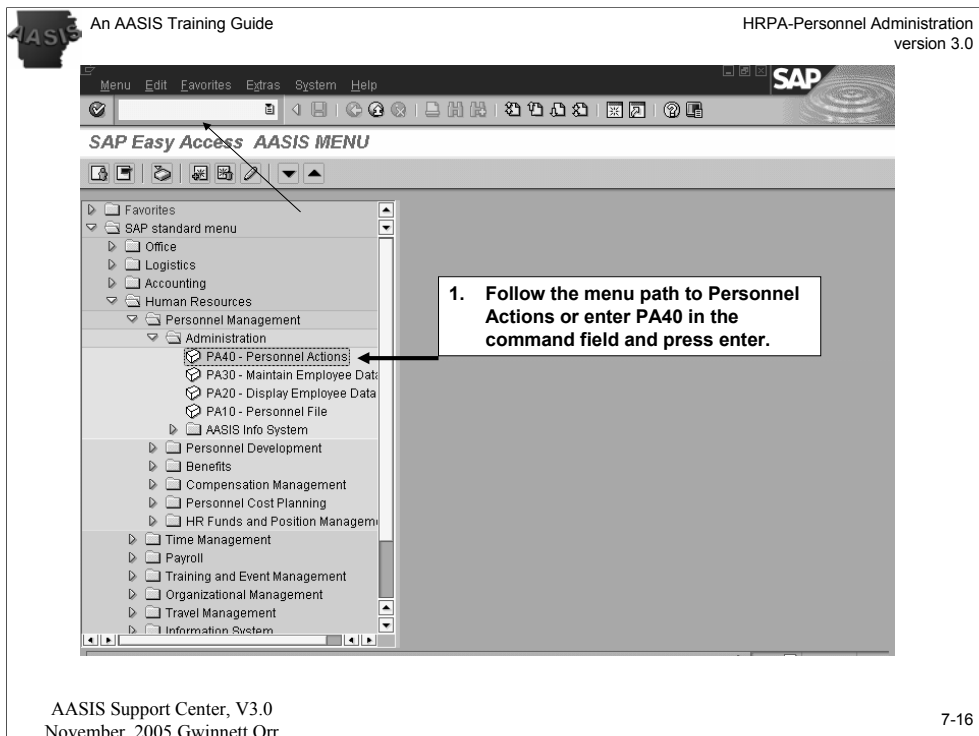
Termination (Phase 1)

Human Resources > Personnel Management >
Administration > HR Master Data > Personnel Actions
(PA40)



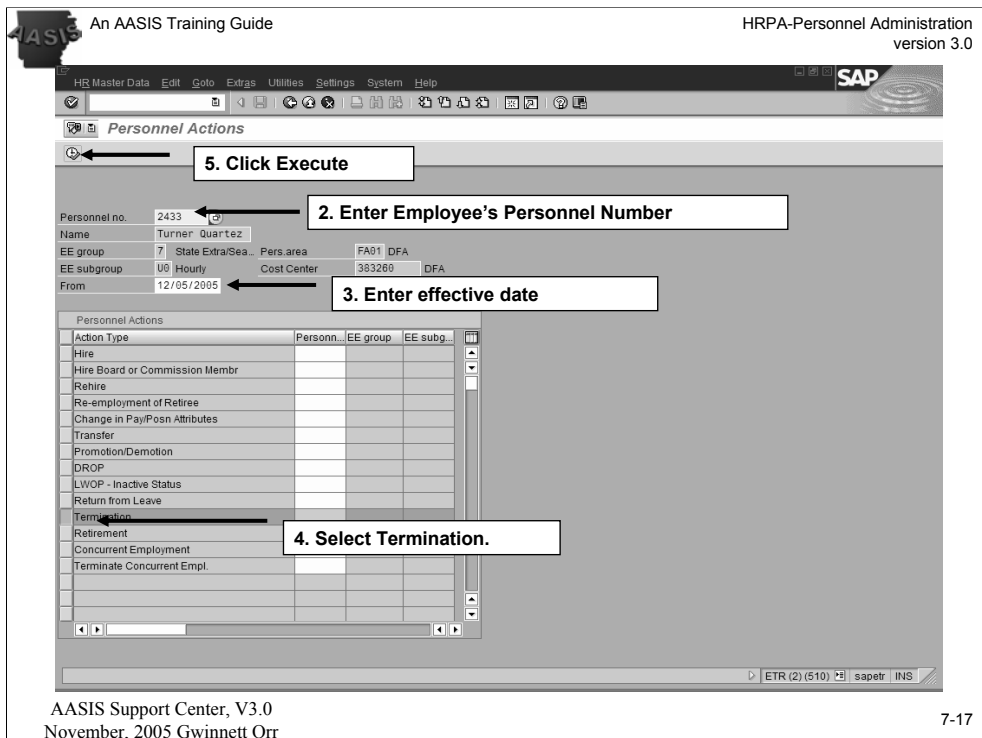
Note: Before you begin this process, you **MUST** contact the Time Management Specialist to make sure that no time is entered on the employee after the date the employee is to be terminated.

Also, you **MUST** contact the Payroll person to make sure that the employee is not in claim status. If there is an outstanding claim (employee owes money), you can request that the personnel record be locked so the employee doesn't get paid until the issue is resolved. To request that a personnel record be locked, email State Payroll Manager at OPM/State Payroll Systems (micki.poteet@dfa.state.ar.us).



Note: A Termination Action must be processed immediately. Delay of processing Termination Actions on exempt employees could result in an overpayment. Your agency **MUST** run a forced retro-calculation of Time Evaluation when the Termination Action is processed after the actual termination date.

Please notify your Agency Central Time Management, if there has been a delay in the termination processing. A forced retro-calculation of time evaluation must be run to pay the employee correctly. The forced retro-calculation effective date must be the beginning of the pay period in which the termination occurs or on the termination date. If the forced retro-calculation of time evaluation is not run the employee will be overpaid.



Note: In the 'From' field, enter the last day the employee will be on the payroll.

The effective date must not be earlier than the beginning of the first pay period of the fiscal year. For example, an action initiated on 7/6/04 may have an effective date no earlier than 6/20/04.

If it is necessary for the agency to have an effective date beyond the first pay period of the fiscal year limit, the agency must send a request with justification to State Payroll Manager at the Office of Personnel Management/State Payroll (fax number 501-682-5094) for approval.



The screenshot shows the SAP 'Copy Actions' transaction. The interface includes a menu bar (prototype, Edit, Goto, Extras, System, Help) and a toolbar. The main area is divided into several sections:

- Personnel action:** Contains a table with columns 'Action type' and 'Reason for action'. The 'Action type' is set to 'Termination'. A callout box labeled '6. Select a reason from the drop-down list.' points to the 'Reason for action' column.
- Status:** Contains a table with columns 'Customer-specific', 'Employment', and 'Special payment'. The values are 'No Concurrent Employment', 'Withdrawn', and 'No special payment' respectively.
- Organizational assignment:** Contains a table with columns 'Position', 'Personnel area', 'Employee group', and 'Employee subgroup'. The values are '22116697', 'DFA STATE PURCHASINO CA...', 'HLB7', 'State Extra/Seasonal', and 'Hourly' respectively.
- Additional actions:** Contains a table with columns 'Start date', 'Act', 'Action type', 'ActR', and 'Reason for act'.

Callout boxes indicate the following steps:

- 7. Click Enter.** Points to the 'Enter' button in the top toolbar.
- 8. Click Save.** Points to the 'Save' button in the top toolbar.

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Note: The 'Start' date will reflect the day following the employee's last day to be on the payroll. **DO NOT CHANGE.** The date is changed to allow the employee to get paid through their last working day.



Prototype Edit Goto Extras System Help

Copy Organizational Assignment

9. Click Enter. 10. Click Save.

Personnel
EE group 7 State Extra/Seasonal Personnel ar FA81 DFA
EE subgroup 00 Hourly SSN 452-22-5856
Start 09/20/2004 12/31/9999

Enterprise structure
CoCode ARK State of Arkansas Leg person
Pers area FA81 DFA Subarea DAL2 OT,Std,H9
Cost Ctr 383268 DFA Bus. Area 0618 DEPT OF FINANCE AND ...

Personnel structure
EE group 7 State Extra/Seasonal Payr area 11 Arkansas Bi-Weekly
EE subgroup 00 Hourly Contract 1000 Hours/Year

Organizational plan
Percentage 100.00
Position 22070413 V006
Job key 21667977 9999
Exempt N
Org. Unit 21705318 DIR
Directors Office

Administrators
PersAdmin 117 Constance L Staggars
Time 113 Sherry Lewis
PayAdmin 123 Linda R Hill

Additional fields
Benefits Administrator 125 Phylcia Gates

NOTE: DO NOT CHANGE THE INFORMATION ON THIS SCREEN.

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InfoType Edit Data Entries System Help

Change Organizational Assignment

9. Click Enter. 10. Click Save.

EE group 7 State Extra/Seasonal Personnel ar HL87 Department of Health
EE subgroup U8 Hourly SSN 402-22-5856
Start 10/24/2004 to 12/31/9999 Chng 10/22/2004 SL0RR

Enterprise structure
CoCode ARK State of Arkansas Leg person
Pers. area HL87 Department of Health Subarea NEL1 NOT.Ex.ASHB
Cost Ctr 382260 DFA Bus. Area 0610 DEPT OF FINANCE AND ...

Personnel structure
EE group 7 State Extra/Seasonal Payr. area 11 Arkansas Bi-Weekly
EE subgroup U8 Hourly Contract 1000 Hours/Year

Organizational plan
Position 99999999 Integration: default po...
Job key 22116696 DFA STATE PURCHA...
Exempt E
Org Unit 21705309 Office of State Purcha...
Org key HL870600383260
Supervisor

Administrator
PersAdmin 100 Qin Wood Alexander
Time 100 Qin Wood Alexander
PayAdmin 100 Qin Wood Alexander

Additional fields
Benefits Administrator 100 Qin Wood Alexander

Record created ETR (t) (515) sapetr INS

NOTE: DO NOT CHANGE THE INFORMATION ON THIS SCREEN.



The screenshot shows the SAP 'Create Monitoring of Tasks' screen. The interface includes a menu bar at the top with options like 'prototype', 'Edit', 'Data', 'Extras', 'System', and 'Help'. Below the menu bar is a toolbar with various icons. The main area contains several input fields and sections. A table at the top lists personnel information: Personnel No. 478, Name Quatez, Status Active, EE group 7, State Cond Season, Personnel ar HL87, and Department of Health. Below this is a section for 'Task' with fields for Task Type, Last Pay Date (10/24/04), Processing indicator, and New task. There is also a 'Reminder' section with fields for Reminder Date and Leadfollow-up time, and a 'Comments' section with a text area. Numbered callouts point to specific fields: 11 points to the 'Last Pay Date' field, 12 points to the 'Enter' key icon, 13 points to the 'Save' button, and 14 points to the 'Next' button.

11. Enter employee's last day to be on the payroll.

12. Click Enter.

13. Click Save.

14. Click next record to go to next screen.

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Note: This screen is optional. If you do not want to store any information on this screen, then skip to step 14.

15. Select the object(s).

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Note: If the employee does not have any objects on loan recorded on infotype 0040, this screen will not appear. Thus, the Termination Action is completed.

If your agency's person with the role of Agency Benefits Specialists is not identified as the Benefits Administrator on the Organizational Assignment infotype 0001, you will need to IMMEDIATELY notify that person of the Termination action and the actual date the employee is no longer a state employee.



Exercise Scenario #15 (Phase 2)

- An employee has terminated, you must determine if changes need to be made to the existing bank details.





Demonstration

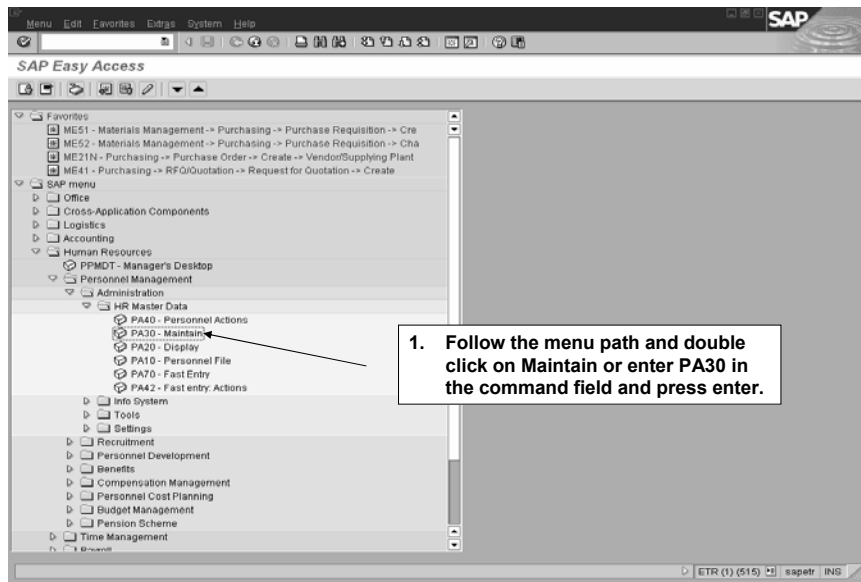
Process Bank Details (Phase 2) – Delimit Direct Deposit

Human Resources > Personnel Management >
Administration > HR Master Data > Maintain (PA30)

This is the second phase of the Termination Action and **MUST** be performed by the Agency if an Employee has additional direct deposit records.



Note: You may use this demonstration any time an employee needs to make changes to their bank details record.






The screenshot shows the SAP HR Master Data maintenance interface. The title bar reads 'HR master data' and the menu bar includes 'Edit', 'Goto', 'Extras', 'Utilities', 'Settings', 'System', and 'Help'. The main window title is 'Maintain HR Master Data'. Below the title bar, there are fields for 'Personnel no.' (R78), 'Name' (Quatez, Turner), 'EE group' (7), 'State Emp/Sea.' (M), 'Pers. area' (M), 'EE subgroup' (U8), 'Hourly', 'Cost Center' (382260), and 'LFA'. A callout box with the text '4. Click Maintain overview icon' points to a person icon in the top toolbar. Below these fields are tabs for 'Employment Issues', 'Career Management', 'Benefits', 'Payroll', and 'Taxes'. The 'Employment Issues' tab is active, showing a list of infotypes on the left: 'Infotype text', 'Basic Pay', 'Recurring Payments/Deductions', 'Additional Payments', 'Cost Distribution', 'Bank Details', 'External Bank Transfers', 'Payroll Status', 'Payroll Results', and 'Hourly Rate per Assignment'. A callout box with the text '2. Enter personnel number' points to the 'Personnel no.' field. Another callout box with the text '3. Select Bank Details infotype' points to the 'Bank Details' infotype in the list. A third callout box with the text '4. Click Maintain overview icon' points to the person icon in the top toolbar. The 'Bank Details' infotype is selected, and a 'Direct selection' section shows 'Infotype' and 'Bank Details'. A 'Choose' button is visible. The bottom status bar shows 'ETR (1) (515)' and 'sapetr INS'.

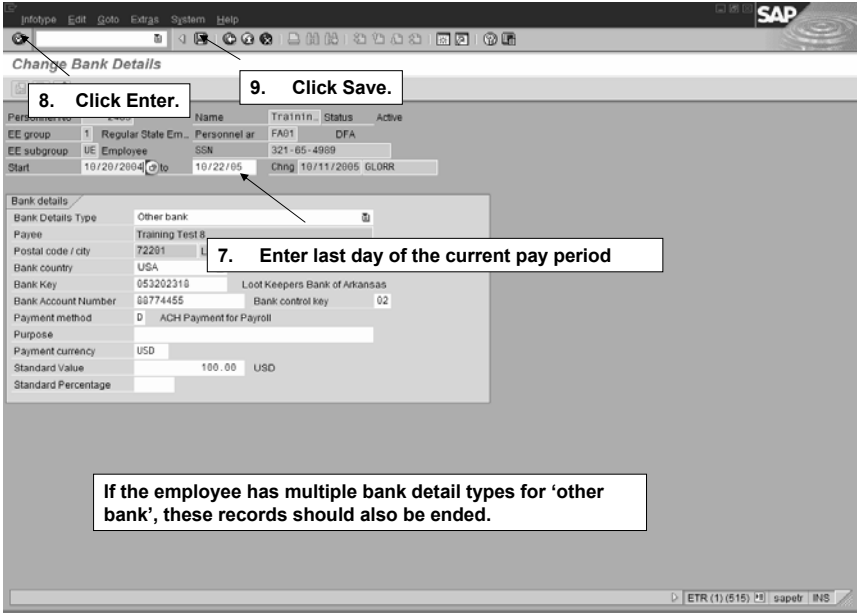
[illegible]

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8. Click Enter.

9. Click Save.

7. Enter last day of the current pay period

If the employee has multiple bank detail types for 'other bank', these records should also be ended.


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Note: In step 7, the last day of the current pay period is the pay period the employee is terminated or the pay period the employee wants to end their direct deposit.


Remember: There must always be one bank details record remaining for an employee.

In case an employee has the other bank detail used to pay a direct payment (car note, mortgage, etc), end the second direct deposit at the end of the pay period.


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InfoType Edit Goto Extras System Help



List Bank Details

Personnel No

2485

Name

Training...

Status

Active

EE group

1 Regular State Em

Personnel ar

FA01 DFA

EE subgroup

UE Employee

SSN

321-65-4989

Choose

B1/01/1800

To

12/31/9999

STy...

View the ended direct deposit record.

You will receive the message stating:
Record changed.

Record changed

ETR (1) (515)

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Note: You can view the end date for the direct deposit already terminated.



Questions and Answers

